

IN THE UNITED STATES DISTRICT COURT OF THE WESTERN DISTRICT OF
WASHINGTON AT TACOMA

TIEGAN TIDBALL,

Plaintiff,

vs.

SAFECO INSURANCE COMPANY OF
AMERICA,

Defendant.

No. 3:23-cv-05608-BHS

STIPULATED MOTION AND
PROTECTIVE ORDER

NOTE ON MOTION CALENDAR:
DECEMBER 7, 2023

1. PURPOSES AND LIMITATIONS

Discovery in this action is likely to involve production of confidential, proprietary, or private information for which special protection may be warranted. Accordingly, the parties hereby stipulate to and petition the Court to enter the following Stipulated Protective Order. The parties acknowledge that this agreement is consistent with Local Civil Rule 26(c). It does not confer blanket protection on all disclosures or responses to discovery; the protection it affords from public disclosure and use extends only to the limited information or items that are entitled to confidential treatment under the applicable legal principles, and it does not presumptively entitle parties to file confidential information under seal.

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1 **2. “CONFIDENTIAL” MATERIAL**

2 “Confidential” material may include the following documents and tangible things produced
3 or otherwise exchanged: It is anticipated plaintiffs may designate the following information as
4 confidential:

- 5 1. Plaintiff’s financial records;

6 It is anticipated that Safeco may designate the following information as confidential:

- 7 1. Defendant’s internal policies and practices;
8 2. Information relating to Defendant’s underwriting procedures, including pricing and
9 rating;
10 3. Internal claim analysis;
11 4. Claims handling guidelines and related training material;
12 5. Reserving guidelines;
13 6. Reserve and/or reinsurance information;
14 7. Other insureds’ claim files or underwriting files;
15 8. Personnel files; and
16 9. Any and all outside business consulting reports or communications not related to
17 the particular claim at issue in this action.

18 The listing of specific types of documents is not an admission that such are relevant to this
19 case, that such are otherwise subject to discovery or admissible in evidence, or that such are
20 actually confidential. Such listing simply indicates that if such production is required, it will be
21 done pursuant to the terms of this Protective Order.

22 There may be other categories of documents, and this list may be expanded or narrowed as
23 discovery progresses by Court order or agreement of the parties.

1 **3. SCOPE**

2 The protections conferred by this agreement cover not only confidential material (as
3 defined above), but also (1) any information copied or extracted from confidential material; (2) all
4 copies, excerpts, summaries, or compilations of confidential material; and (3) any testimony,
5 conversations, or presentations by parties or their counsel that might reveal confidential material.

6 However, the protections conferred by this agreement do not cover information that is in
7 the public domain or becomes part of the public domain through trial or otherwise.

8 **4. ACCESS TO AND USE OF CONFIDENTIAL MATERIAL**

9 4.1 Basic Principles. A receiving party may use confidential material that is disclosed
10 or produced by another party or by a non-party in connection with this case only for prosecuting,
11 defending, or attempting to settle this litigation. Confidential Material may be disclosed only to
12 the categories of persons and under the conditions described in this agreement. Confidential
13 material must be stored and maintained by a receiving party at a location and in a secure manner
14 that ensures that access is limited to the persons authorized under this agreement.

15 4.2 Disclosure of “CONFIDENTIAL” Information or Items. Unless otherwise ordered
16 by the court or permitted in writing by the designating party, a receiving party may disclose any
17 confidential material only to:

18 (a) the receiving party’s counsel of record in this action, as well as employees of
19 counsel to whom it is reasonably necessary to disclose the information for this litigation;

20 (b) the officers, directors, and employees (including in house counsel) of the receiving
21 party to whom disclosure is reasonably necessary for this litigation, unless the parties agree that a
22 particular document or material produced is for Attorney’s Eyes Only and is so designated
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1 (c) experts and consultants to whom disclosure is reasonably necessary for this
2 litigation and who have signed the “Acknowledgment and Agreement to Be Bound” (Exhibit A);

3 (d) the court, court personnel, and court reporters and their staff;

4 (e) copy or imaging services retained by counsel to assist in the duplication of
5 confidential material, provided that counsel for the party retaining the copy or imaging service
6 instructs the service not to disclose any confidential material to third parties and to immediately
7 return all originals and copies of any confidential material;

8 (f) during their depositions, witnesses in the action to whom disclosure is reasonably
9 necessary and who have signed the “Acknowledgment and Agreement to Be Bound” (Exhibit A),
10 unless otherwise agreed by the designating party or ordered by the court. Pages of transcribed
11 deposition testimony or exhibits to depositions that reveal confidential material must be separately
12 bound by the court reporter and may not be disclosed to anyone except as permitted under this
13 agreement;

14 (g) the author or recipient of a document containing the information or a custodian or
15 other person who otherwise possessed or knew the information.

16 4.3 Filing Confidential Material.

17 Before filing confidential material or discussing or referencing such material in court
18 filings, the filing party shall confer, pursuant to Local Civil Rule 5(g)(3)(A), with the designating
19 party to determine whether the designating party will remove the confidential designation, whether
20 the document can be redacted, or whether a motion to seal or stipulation and proposed order is
21 warranted. During the meet and confer process, the designating party must identify the basis for
22 sealing the specific confidential information at issue, and the filing party shall include this basis in
23 its motion to seal, along with any objection to sealing the information at issue. Local Civil Rule

5(g) sets forth the procedure that must be followed and the standards what will be applied when a party seeks permission from the court to file material under seal. A party who seeks to maintain the confidentiality of its information must satisfy the requirements of Local Civil Rule 5(g)(3)(B), even if it is not the party filing the motion to seal. Failure to satisfy this requirement will result in the motion to seal being denied, in accordance with the strong presumption of public access to the Court's files.

5. DESIGNATING PROTECTED MATERIAL

5.1 Exercise of Restraint and Care in Designating Material for Protection. Each party or non-party that designates information or items for protection under this agreement must take care to limit any such designation to specific material that qualifies under the appropriate standards. The designating party must designate for protection only those parts of material, documents, items, or oral or written communications that qualify, so that other portions of the material, documents, items, or communications for which protection is not warranted are not swept unjustifiably within the ambit of this agreement.

Mass, indiscriminate, or routinized designations are prohibited. Designations that are shown to be clearly unjustified or that have been made for an improper purpose (*e.g.*, to unnecessarily encumber or delay the case development process or to impose unnecessary expenses and burdens on other parties) expose the designating party to sanctions.

If it comes to a designating party's attention that information or items that it designated for protection do not qualify for protection, the designating party must promptly notify all other parties that it is withdrawing the mistaken designation.

5.2 Manner and Timing of Designations. Except as otherwise provided in this agreement (see, *e.g.*, second paragraph of section 5.2(a) below), or as otherwise stipulated or

ordered, disclosure or discovery material that qualifies for protection under this agreement must be clearly so designated before or when the material is disclosed or produced.

(a) Information in documentary form: (e.g., paper, or electronic documents and deposition exhibits, but excluding transcripts of depositions or other pretrial or trial proceedings), the designating party must affix the word “CONFIDENTIAL” to each page that contains confidential material. If only a portion or portions of the material on a page qualifies for protection, the producing party also must clearly identify the protected portion(s) (e.g., by making appropriate markings in the margins).

(b) Testimony given in deposition or in other pretrial proceedings: the parties and any participating non-parties must identify on the record, during the deposition or other pretrial proceeding, all protected testimony, without prejudice to their right to so designate other testimony after reviewing the transcript. Any party or non-party may, within fifteen days after receiving the transcript of the deposition or other pretrial proceeding, designate portions of the transcript, or exhibits thereto, as confidential. If a party or non-party desires to protect confidential information at trial, the issue should be addressed during the pre-trial conference.

(c) Other tangible items: the producing party must affix in a prominent place on the exterior of the container or containers in which the information or item is stored the word “CONFIDENTIAL.” If only a portion or portions of the information or item warrant protection, the producing party, to the extent practicable, shall identify the protected portion(s).

5.3 Inadvertent Failures to Designate. If timely corrected, an inadvertent failure to designate qualified information or items does not, standing alone, waive the designating party’s right to secure protection under this agreement for such material. Upon timely correction of a

1 designation, the receiving party must make reasonable efforts to ensure that the material is treated
2 in accordance with the provisions of this agreement.

3 **6. CHALLENGING CONFIDENTIALITY DESIGNATIONS**

4 6.1 Timing of Challenges. Any party or non-party may challenge a designation of
5 confidentiality at any time. Unless a prompt challenge to a designating party's confidentiality
6 designation is necessary to avoid foreseeable, substantial unfairness, unnecessary economic
7 burdens, or a significant disruption or delay of the litigation, a party does not waive its right to
8 challenge a confidentiality designation by electing not to mount a challenge promptly after the
9 original designation is disclosed.

10 6.2 Meet and Confer. The parties must make every attempt to resolve any dispute
11 regarding confidential designations without court involvement. Any motion regarding confidential
12 designations or for a protective order must include a certification, in the motion or in a declaration
13 or affidavit, that the movant has engaged in a good faith meet and confer conference with other
14 affected parties in an effort to resolve the dispute without court action. The certification must list
15 the date, manner, and participants to the conference. A good faith effort to confer requires a face-
16 to-face meeting or a telephone conference.

17 6.3 Judicial Intervention. If the parties cannot resolve a challenge without court
18 intervention, any party may file and serve a motion to retain or remove the confidentiality
19 designation under Local Civil Rule 7 (and in compliance with Local Civil Rule 5(g), if applicable).
20 The burden of persuasion in any such motion shall be on the designating party. Frivolous
21 challenges, and those made for an improper purpose (e.g., to harass or impose unnecessary
22 expenses and burdens on other parties) may expose the challenging party to sanctions. All parties
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1 shall continue to maintain the material in question as confidential until the court rules on the
2 challenge.

3 **7. PROTECTED MATERIAL SUBPOENAED OR ORDERED PRODUCED IN**
4 **OTHER LITIGATION**

5 If a party is served with a subpoena or a court order issued in other litigation that compels
6 disclosure of any information or items designated in this action as “CONFIDENTIAL,” that party
7 must:

8 (a) promptly notify the designating party in writing and include a copy of the subpoena
9 or court order;

10 (b) promptly notify in writing the party who caused the subpoena or order to issue in
11 the other litigation that some or all of the material covered by the subpoena or order is subject to
12 this agreement. Such notification shall include a copy of this agreement; and

13 (c) cooperate with respect to all reasonable procedures sought to be pursued by the
14 designating party whose confidential material may be affected.

15 **8. UNAUTHORIZED DISCLOSURE OF PROTECTED MATERIAL**

16 If a receiving party learns that, by inadvertence or otherwise, it has disclosed confidential
17 material to any person or in any circumstance not authorized under this agreement, the receiving
18 party must immediately (a) notify in writing the designating party of the unauthorized disclosures,
19 (b) use its best efforts to retrieve all unauthorized copies of the protected material, (c) inform the
20 person or persons to whom unauthorized disclosures were made of all the terms of this agreement,
21 and (d) request that such person or persons execute the “Acknowledgment and Agreement to Be
22 Bound” that is attached hereto as Exhibit A.
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1 **9. INADVERTENT PRODUCTION OF PRIVILEGED OR OTHERWISE**
 2 **PROTECTED MATERIAL**

3 When a producing party gives notice to receiving parties that certain inadvertently
 4 produced material is subject to a claim of privilege or other protection, the obligations of the
 5 receiving parties are those set forth in Federal Rule of Civil Procedure 26(b)(5)(B). This provision
 6 is not intended to modify whatever procedure may be established in an e-discovery order or
 7 agreement that provides for production without prior privilege review. The parties agree to the
 8 entry of a non-waiver order under Fed. R. Evid. 502(d) as set forth herein.

8 **10. NON-TERMINATION AND RETURN OF DOCUMENTS**

9 Within 60 days after the termination of this action, including all appeals, upon request by
 10 the designating party, each receiving party must return all confidential material to the producing
 11 party, including all copies, extracts, and summaries thereof. Alternatively, the parties may agree
 12 upon appropriate methods of destruction.

13 Notwithstanding this provision, counsel are entitled to retain one archival copy of all
 14 documents filed with the court, trial, deposition, and hearing transcripts, correspondence,
 15 deposition and trial exhibits, expert reports, attorney work product, and consultant and expert work
 16 product, even if such materials contain confidential material.

17 The confidentiality obligations imposed by this agreement shall remain in effect until a
 18 designating party agrees otherwise in writing or a court orders otherwise.

19 IT IS SO STIPULATED, THROUGH COUNSEL OF RECORD.

20 DATED: December 7, 2023

s/Jesse Froehling
 Attorneys for Plaintiff

22 DATED: December 7, 2023

s/Galina Kletser Jakobson
 Attorneys for Defendant

1 PURSUANT TO STIPULATION, IT IS SO ORDERED

2 IT IS FURTHER ORDERED that pursuant to Fed. R. Evid. 502(d), the production of any
3 documents in this proceeding shall not, for the purposes of this proceeding or any other federal or
4 state proceeding, constitute a waiver by the producing party of any privilege applicable to those
5 documents, including the attorney-client privilege, attorney work-product protection, or any other
6 privilege or protection recognized by law.

7 DATED this 8th day of December, 2023.

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10 BENJAMIN H. SETTLE
11 United States District Judge
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